



Create a User Defined Field

To create a user defined field (UDF), complete the following steps:

1. Click the **Administration** tab.
2. From the **Manage Organizations** menu, select **User Defined Fields>Modify**. The *Select OTC Endpoint* screen appears.
3. Select the highest level organization for which you want to modify user defined fields (UDFs). The *Step 1 of 3: Select User Defined Field to Maintain* page appears.
4. Click the **Create UDF**. The *Step 2 of 3: Modify the User Defined Field* page appears.
5. Add the user defined field, and click **Done**.

You can add a user defined field by

- Selecting the **Activity** type for the user defined field
 - Entering the **Label** and **Description**
 - Selecting a **Data Type**
 - If the **Drop Down List of Alphanumeric Values** Data Type is selected, proceed to step 6.
 - If another **Data Type** is selected, continue entering in information for the fields below and then proceed to step 7.
 - Entering the
 - **Maximum Input Length** (Maximum length is 255)
 - **Minimum Input Length**
 - **Display Order Number**
 - Selecting **Mandatory** or **Optional** for Activity User Entry
6. A **Permitted Values** button appears. Click **List Values**. A *Step 2 of 3 (Continued): Define Permitted Values* page appears. Enter details for both the **Value** and **Description**, and click **Done**.
 7. The *Step 3 of 3: Review* page appears. Verify the User Defined Field information is correct, and click **Submit**. A confirmation page appears showing that the UDF data has been saved to the database.



Application Tip

Click **Edit** if you need to make additional changes before submitting the information and return to Step 5.

**Application Tip**

Additional buttons on the page help you perform other tasks:

- Click **Cancel** to return to the OTCnet Home Page. No data will be saved.
- Click **Edit** to return to the previous page.
- Click **Next** to advance to the next page.
- Click **Previous** to return to the previous page.
- Click **Return Home** to return to the OTCnet Home Page.